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ABSTRACT

This publication is one of five training manuals that present plans and materials for use in instructing school administrators in some of the concepts, principles, and techniques of educational management. They were developed as part of the Educational Management Project for presentation at weekly inservice meetings for administrators in the Tucson Public Schools in 1973-74. Altogether, the five manuals contain outlines and instructional materials for 15 inservice training sessions; this particular booklet deals with sessions 1, 2, and 3, which focus on decision-making and management functions. The set of materials for each session includes (1) an instructor's guide and a list of the performance objectives for that session, (2) participant handouts for use as reference material during and after the session, (3) participant worksheets for illustrating or practicing skills introduced during the session, and (4) a posttest for determining whether the participants met the session's objectives. The sessions may be conducted separately as topical workshops or together as a comprehensive one-semester inservice course. (Author/JG)

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EDUCATIONAL MANAGEMENT

AN INSERVICE TRAINING MANUAL FOR EDUCATIONAL ADMINISTRATORS

PART I

DECISION MAKING AND THE MANAGEMENT FUNCTIONS

Management Study Group Sessions 1, 2, 3

Produced by
The Educational Management Project
E.S.E.A. Title III
Tucson Public Schools
Tucson, Arizona
June, 1974

EA 008 062

TO THE PROSPECTIVE INSTRUCTOR:

These materials are part of a set of 17 sessions for instructing practicing school administrators in some of the concepts, principles and techniques of educational management. They were originally designed to be conducted at weekly inservice meetings for administrators in Tucson, Arizona during the 1973-74 school year.

To become familiar with the scope of educational management, an administrator should participate in all 17 sessions. However, if you are interested in introducing administrators to only certain aspects of the field, almost any session can be conducted as a unit.

Each set of session materials consists of these items:

1) An instructor's guide for conducting each session activity and a list of the performance objectives for that session
2) All participant handouts for use as reference material during and after the session
3) All participant worksheets for illustrating or practicing skills introduced during the session
4) A posttest for determining whether the participants met the session's objectives (which may also be administered as a pretest).

Each two-and-a-half-hour session was designed to be conducted in three parts:

1) Review of the previous session and informal conversation (15-45 minutes)
2) Administration of pretest for current session and posttest for previous session, discussion of posttest (15-30 minutes)
3) Session activities as described in the instructor's guide (up to 2 hours)

Most of the sessions, however, take longer to conduct than two and a half hours. Depending upon the administrators' level of interest and the degree of difficulty they have in understanding session topics, the total time needed can be as much as 5-6 hours. Be prepared to schedule a second meeting to complete each session.

Before you schedule and conduct any of the sessions, make sure you are prepared to lead the discussions and answer any questions raised by the administrators in the group. To help you do this, we have prepared a list of readings keyed to each session topic (or to sets of related topics). This annotated bibliography is available from the Project under the title of "Readings for the Preparation of the Study Group instructor".

EDUCATIONAL MANAGEMENT PROJECT
E.S.E.A. Title III
Tucson Public Schools

Management Study Group

Session 1

The Functions of Educational Management

Objectives

After participating in this session's activities, the participant will:

1. Know the concepts of planning, organizing, directing and controlling. (13)
2. Know how management and administration differ in the context of the Educational Management Project.(?)
3. Judge the above concepts to be apparently consistent or at least compatible with his values concerning the management of educational organizations and with his past experience. (2)
4. Judges the above concepts to be no more difficult to comprehend than the concepts of educational administration to which he has previously been exposed. (3)

Achievement of these objectives will be measured by means of a written instrument administered to the participants before the session activities and after the discussion and review phase of the succeeding session. At least 60% of those attending will successfully achieve at least three of the four objectives.

Activities for Part 3 of This Session

1-1. Management and Administration (35-45 minutes)

Have each member of the group read his definitions of management and administration from his pretest to the rest of the team. Note the degree of difference or similarity in the responses as they are read, and point this out to the team members. Discuss these two concepts with the group, asking them to identify the sources or experiences from which their present understanding of the two terms has been derived. Ask the group members also to identify any positive or negative attitudes they have toward the application of these terms in an educational setting, and how they think they have acquired these attitudes.

Present the correct definitions of administration and management and discuss them briefly with the group. (Distribute Handout 1-1.) Give the group one or two

examples of activities pertinent to each and then ask the team members to list several more. Distribute and discuss Handout 1-2. Ask the team whether the duties of their individual positions are the duties of an administrator or a manager or both. The team members may also be interested in discussing what proportion of their time is spent in administrative activity and what proportion is spent in management activity.

1-2. The Functions of Management (50-70 minutes)

Have the team members read the names and definitions of the management functions from their pretest. Distribute and discuss Handouts 1-3 and 1-4. Clarify the definitions and ask the group whether the functions as defined seem to be an appropriate way of analyzing the manager's role.

Taking one function at a time, ask the group to name as many activities as they can think of that would be included in the performance of that particular function. When lists have been compiled for all four functions, distribute and discuss Handout 1-5, attempting to match the categories of the Taxonomy with the examples the team members have provided. Discuss the Taxonomy briefly.

Divide the group according to the positions they hold. For example, assign all principals to one group, and all coordinators to another group. Give each team about 15 minutes to develop a brief written description of the management responsibilities peculiar to their position, using the general outline provided on the worksheet, The Functions of an Educational Manager. Appoint one team member from each team to serve as a recorder for his team.

When the teams have completed their worksheets, ask each team to describe verbally the management responsibilities of the position for which the other team wrote a description. Itemize these descriptions on the blackboard. Permit no discussion between teams while these descriptions are being made. Ask each team's recorder to read his team's written description, itemizing each description on the board as before. Ask the group to discuss the relative clarity and accuracy of the pairs of descriptions and to identify any wide disparities and the possible causes of such disparities. Clarify any apparent misunderstanding of the four management functions before concluding the discussion.

Educational Management or Educational Administration?

Educational Management: The making of decisions for the purpose of creating, maintaining and improving an educational system.

Educational Administration: The execution of management decisions for the purpose of keeping the activities of that part of the educational subsystem for which the administrator is responsible compatible with the goals of the total system.

MANAGEMENT AND ADMINISTRATION IN AN EDUCATIONAL SYSTEM

DISTRICT LEVEL	**ADMINISTRATION** OF STATE LAWS AND BOARD POLICIES; OBSERVANCE OF PERTINENT LOCAL ORDINANCES, ETC.
	MANAGEMENT OF DISTRICT EDUCATIONAL PROGRAMS--DEFINITION OF BROAD GOALS, OBJECTIVES, POLICIES AND ACTIVITIES
BUILDING OR DEPARTMENT LEVEL	**ADMINISTRATION** OF GOALS, OBJECTIVES, POLICIES ESTABLISHED BY DISTRICT; EXECUTION OF BROAD ACTIVITIES ESTABLISHED BY DISTRICT
	MANAGEMENT OF BUILDING'S EDUCATIONAL PROGRAM--FORMULATION OF MORE SPECIFIC OBJECTIVES AND SELECTION OF STRATEGIES FOR SOLVING BUILDING LEVEL PROBLEMS
PROGRAM LEVEL	**ADMINISTRATION** OF SCHOOL/DEPARTMENT GOALS AND POLICIES; EXECUTION OF DECISIONS AFFECTING WHOLE SCHOOL OR DEPARTMENT IN PROGRAM AREA
	MANAGEMENT OF SPECIFIC EDUCATIONAL OR SERVICE PROGRAM; MAKING DECISIONS WHICH AFFECT OPERATION OF PROGRAM AND SOLUTION OF SPECIFIC PROGRAM PROBLEMS

The Four Functions of Educational Management

Management: The making of decisions for the purpose of creating, maintaining and improving a system.

Planning Function: The making of decisions related to the establishment of a detailed plan for creating, maintaining and improving any particular educational program. Planning decisions result in the creation and/or definition of a system (or program) whose boundaries are determined by the objectives it has been designed to accomplish.

Organizing Function: The making of decisions related to the assignment of appropriate authority and responsibility to those people who will manage and implement the planned program. Organizing decisions result in the creation of an organizational environment maximally conducive to the accomplishment of the objectives of the program.

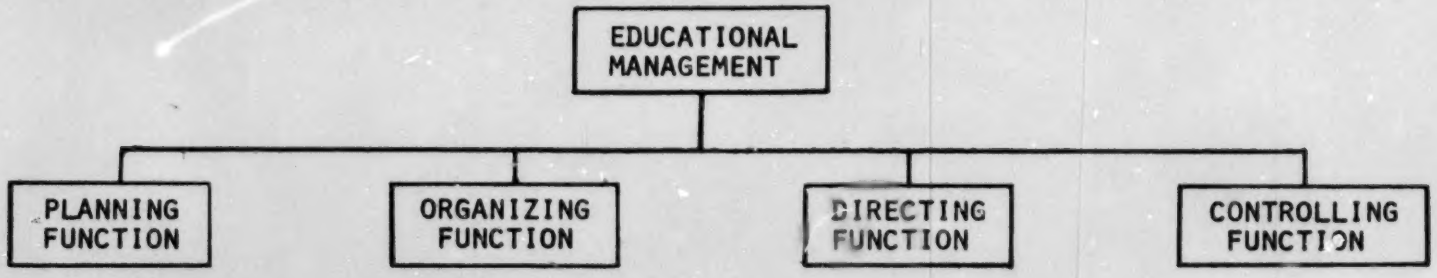
Directing Function: The making of decisions related to the successful motivation of people who have a role to play in the management (planning, organizing, directing, and controlling) and implementation of a planned program. Directing decisions result in the optimal satisfaction of personal needs concurrent with the accomplishment of program objectives.

Controlling Function: The making of decisions related to the timely identification and correction of discrepancies between the program plan and actual program conditions. Control decisions result in the maintenance of program integrity, i.e., in greater assurance that the program will accomplish its objectives.

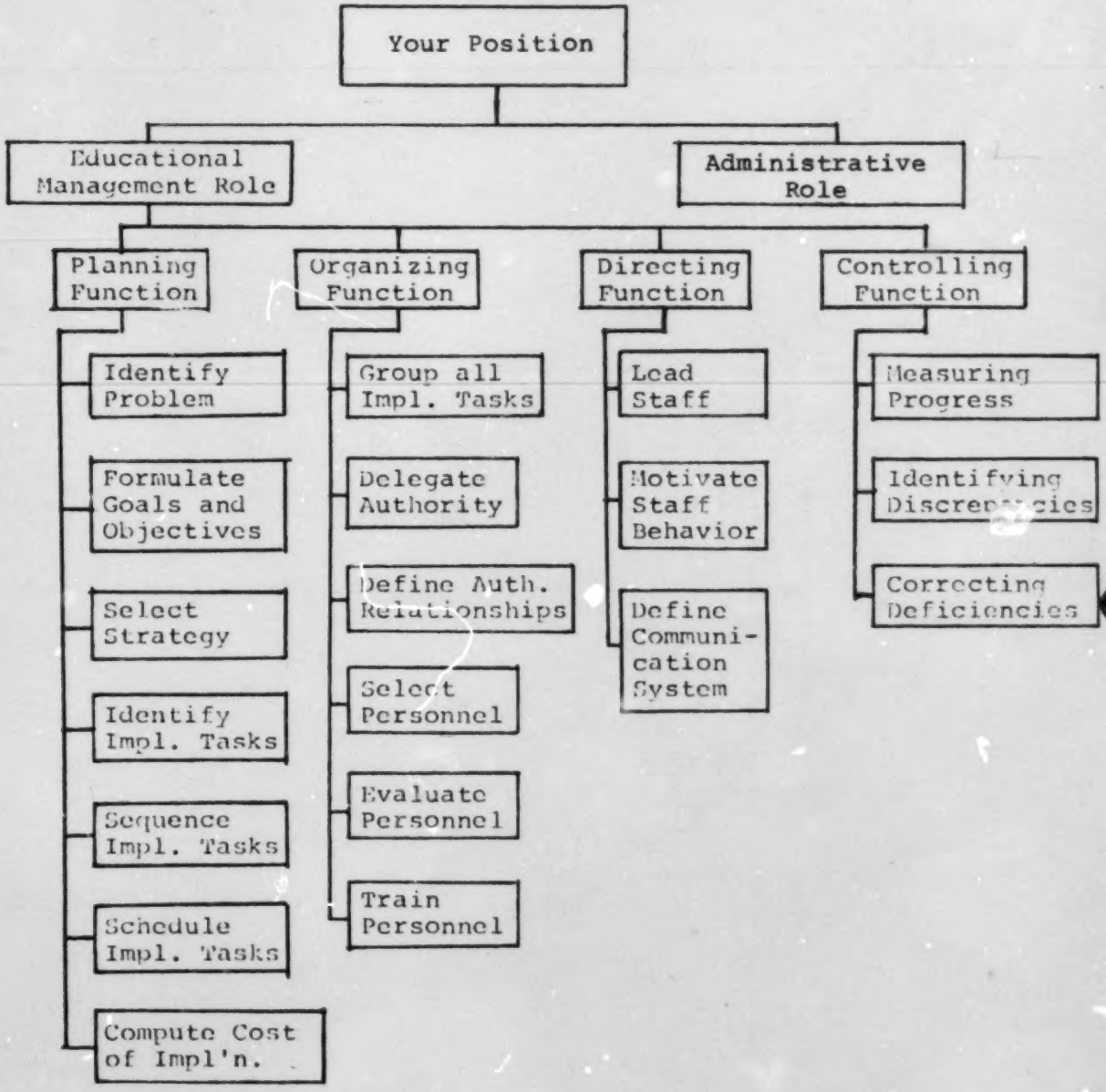
Goals of the Four Management Functions

The Goal of:	*Management*	is to:	*Solve real educational problems*	by:	*Making planning, organizing, directing, and controlling decisions*
The Goal of:	*Planning*	is to:	*Create the best system*	by:	*Establishing detailed plan*
The Goal of:	*Organizing*	is to:	*Create the best organizational environment for the system*	by:	*Assigning appropriate authority and responsibility*
The Goal of:	*Directing*	is to:	*Satisfy personal needs of population of the system*	by:	*Successfully motivating population*
The Goal of:	*Controlling*	is to:	*Maintain the integrity of the system in the implementation stage*	by:	*Identifying and correcting discrepancies between the program plan and actual conditions*

THE FOUR FUNCTIONS OF THE EDUCATIONAL MANAGER



WORKBREAKDOWN STRUCTURE FOR EDUCATIONAL MANAGEMENT



The Functions of an Educational Manager

DIRECTIONS: Keeping in mind the general definitions of the four management functions we have just discussed, complete the following worksheet for the position you and your fellow team members hold. Try to define the four management functions in language more specific to the position you hold. Write complete sentences (like a formal job description), and give examples from your experience to illustrate each kind of activity

We_____, as managers, make decisions for the
(title)
purpose of creating, maintaining and improving_____

_____
(kind of system)

1. What do you plan? Why?

2. What do you organize? Why?

3. Whom do you direct? How? Why?

4. What do you control? Why?

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Tucson Public Schools

Management Study Group

Session 1 Posttest

Name: _____
Date: _____

1. Name the four management functions and describe the management purpose and major activities of the manager for each function.

2. What is educational management? How does it differ from educational administration?

3. At this early point in your Project participation, what is your judgment of the concept of educational management and the four management functions? (Check one)

____So far, these concepts seem compatible with my values and consistent with my experience.
____So far, these concepts seem to violate my beliefs and/or my experience as an educational administrator.
____It's too early to judge; ask me again later in the year.

4. In comparison with theories and concepts of administration you have studied previously, how difficult do you think it will be to understand the theories and concepts of educational management? (Check one)

____No more difficult than it was to understand theories I have previously studied.
____More difficult to grasp than theories previously studied.
____Too soon to judge; ask me again later in the program.

Scoring Key
Session 1 Posttest

1. Responses should include correct names of the functions and a reasonable paraphrase of the definitions given in Handout 1-3.

2. Responses must distinguish the two roles by stating that management is the making of decisions while administration is the execution of decisions made by others.

3. Preferable response is the first one.

4. Preferable response is the first one.

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Tucson Public Schools

Management Study Group

Session 2

Components of the Decision Situation

Objectives

After participating in this session's activities, the participants will:

1. Know the definitions of the three components of any decision-making situation. (18)
2. Demonstrate an intent to be more accurate and precise in his efforts to identify, define and analyze important problems requiring that decisions be made. (7)
3. Demonstrate a desire to be more objective in his evaluation of alternative solutions to identified problems. (18)
4. Believe that in the future he will be able to communicate with others more effectively when he seeks or provides information for making decisions. (9)

The degree to which the participants actually achieve these objectives will be determined in the same way as is described in Session 1.

Activities for Part 3 of This Session

2-1 The Consequences of Premature Decision-Making, Part I (20 minutes)

Distribute Worksheet A to all of the team members. Explain to the participants that the list of alternative solutions they've received is the summarized result of a planning committee's effort after six months of meetings. Instruct the participants that they are to discuss these alternatives and decide as a group which alternative is the best solution. The group should pursue this discussion until every team member agrees on the same alternative.

Stop the discussion when the group reaches agreement or after 10 minutes if the group has not reached agreement. Ask them what difficulties they encountered in trying to obtain total agreement and the causes of these difficulties. If no participant identifies the source of the conflict, ask each team member to state the purpose for which he thought the solutions were intended. Make a list of these purposes on the blackboard so the participants can see the differences in the perspectives from which they were viewing the list of alternatives.

2-2 The Consequences of Premature Decision Making, Part II (20 minutes)

Distribute Worksheet B to the participants and ask them

once again to try to reach agreement on the best solution. Have one member of the group record the arguments for and against each solution strategy considered by the group.

Stop the discussion when agreement has been reached or after 10 minutes if agreement has not been reached by that time. Have one team member report the decision of the group and the justification for choosing that solution strategy. Ask the group to try to identify some of the assumptions they made about the educational situation to which the solution strategy would presumably be applied. List these on the blackboard if any are offered by the participants.

Distribute Worksheet C to the participants, giving them time to read and react to the information provided about the decision situation they have been discussing. Ask the group these questions if the participants' reactions do not reveal recognition of the need for problem identification and analysis before making decisions about solution strategies:

1. Was there a problem needing solution?
2. If so, what exactly had to be changed in order to solve the problem? How much did this variable have to be changed?
3. If you had known this information when the planning committee forwarded its list of alternative solution strategies would a decision have been necessary? How much effort was wasted in not having known this information when you needed it?

2-3 Analyzing a Decision Situation (40-70 minutes)

Distribute Worksheet D, and ask the participants to read the instructions given on the worksheet. Ask the team to examine the information given on the worksheet in an effort to decide whether a decision is necessary. When the group has completed its task, ask these questions and discuss as time premits:

1. How did this exercise differ from the last decision situation in which you were involved?
2. In a "real" decision situation what additional work would you have to do if you were the decision maker?
3. What three categories of information should you seek in order to avoid making premature decisions?
4. What are some possible sources of the information you would need in each of these three categories?

During this discussion period, distribute to the participants Handout 2-1, The Components of a Decision Situation.

September 15, 1973

TO: Members of the Management Study Group

FROM: Faculty Planning Committee, Blue River Elementary School

RE: Request for Assistance

Our committee has met regularly since last January in an effort to identify possible alternatives to some of the instructional approaches we've been using at Blue River at the primary level. We have identified four different possibilities but have been unable to reach general agreement on which alternative is the best suited to our needs.

Several members of your group have visited Blue River often, so we believe you can help us decide what recommendation to make to our principal. We would appreciate hearing from you as soon as possible as we would like to begin implementing the selected alternative this school year.

The four alternatives we have identified are as follows:

1. Remodel the classrooms facing the enclosed patio to permit direct access to the patio from each room. Assign only primary level classes to these rooms and set up movable activity centers in the patio.

2. Request that an elementary school counselor be assigned part-time to work with primary students in small groups on a regular basis.

3. Revise teaching materials and/or teaching strategies to increase the opportunities for students to become involved in group work.

4. Conduct a short inservice program to help primary teachers improve their skills in small group instruction.

Educational Management Project
Bogus Memo

Alternative Selected: _____
Reason(s) for selecting this alternative:

Reasons for rejecting the other alternatives:

Session 2
Worksheet B

September 23, 1973

TO: Members of the Management Study Group

FROM: Blue River Faculty Planning Committee

SUBJECT: Information You Requested

Our committee met yesterday to discuss your group's request that we explain the specific purposes of our planning effort. After some deliberation, we concluded that the purpose for which the four alternatives were developed was:

> To improve primary students' social skills and attitudes.

The Planning Committee agreed that developing effective social skills and positive attitudes toward working with one's peers in a cooperative manner is one of the most important goals at the primary level. Our faculty would very much like to succeed in accomplishing this goal, and would like to develop an effective way of doing so. We very much appreciate your assistance with our efforts.

Incident #1

The day after your group met and agreed on an alternative to recommend to the Blue River Planning Committee, you accidentally meet Bill Peters at the Area Resource Center. Bill is a third grade teacher at Blue River and is a member of the Planning Committee. While Bill is waiting for some materials to be gathered for him, the two of you discuss the Planning Committee's recent request to the Management Study Group. After some questioning from you, Bill describes to you in more detail what the Committee hoped would result from the implementation of the alternate approach your group recommended:

> At the end of the year, at least 75 percent of the second grade students will possess positive attitudes toward working cooperatively with their peers on classroom projects. The second grade teachers will attempt to determine whether the students have developed positive attitudes by keeping track of how frequently each student chooses to work independently and how frequently he chooses to work with his classmates. If he chooses group work more frequently (without having to be coaxed), the teachers will consider the student adequately motivated.

Incident #2

Conversation in Blue River faculty lounge, October 13:

June Williams, a second grade teacher who just joined the Blue River faculty this year, pours herself a cup of coffee and sits down across from another second grade teacher, Beverly Bowers, who is looking over the announcements and ads from her mailbox.

Beverly: Hmm...Have you seen this yet, June? (Reads.) "To all primary teachers; from the principal: You will all be glad to hear that the Faculty Planning Committee has reached a decision on how best to facilitate the development of social skills and attitudes among the primary students. I have made a request for the necessary approval to proceed. Bill Peters will give you more details at our faculty meeting next Monday. Your reactions and suggestions will be welcomed at that time. The Committee's recommended strategy will no doubt make it easier for students to work more successfully with their classmates and will motivate students to participate in group activities more frequently."

Well, I guess it sounds pretty good, but it doesn't tell you much about what's actually going to happen, does it?

June: I'm afraid I'm really in the dark. I'm still trying to get adjusted to a different classroom and different kids. Bill Peters mentioned the other day, though, that the Committee had hoped at least three-fourths of the kids in second grade would choose group work instead of individual work after this year.

Beverly: (Pause) I guess I should have volunteered to be on that committee last year after all.

June: Why?

Beverly: Well, we field tested an attitude inventory for Research and Evaluation last year that had several items on it that dealt with social attitudes and group participation. I found out that only 3 of my 27 kids last year preferred to work alone most of the time. As far as I know the other second grade classrooms came out just about the same. I wish the committee had asked us for some information!

DIRECTIONS: The following list of statements describes a decision situation in which principals and resource personnel may become involved. Read each statement and classify it as belonging to one of these four categories of information:

A - Information about present conditions or circumstances ("What is" information about resource availability, constraints, current activities, etc.)

B - Information about what ought to be done or how it should be done.

C - Information about the known outcomes or results of present or past activities or programs ("What is" information about current achievement).

D - Information about desired results or outcomes ("What ought to be" information, like goals, objectives, purposes, etc.).

____After this year, every teacher should use Teaching Strategy X in his classroom whenever there is evidence that any of his students have the learning problems to which the strategy is applicable.

____Teachers in Our School should acquire the ability to use Teaching Strategy X through formal inservice instruction.

____The deadline for submitting workshop proposals for this year was two months ago.

____The workshop should be held at a time that is convenient for all the teachers.

____Dr. John C., a University professor, has approached the principal and expressed a desire to get teachers more interested in using Teaching Strategy X.

____The workshop should be conducted during school time if possible.

____All the teachers should be required to take Dr. C.'s course at the University of Arizona.

____Teachers should be required to attend a summer workshop about Teaching Strategy X.

____Every teacher should possess the skills required to use Teaching Strategy X in mathematics instruction.

____Teachers should get credit (academic or salary) for participating in the workshop.

____A couple of the teachers at Our School plan to go to Europe next summer and do not plan to return until the weekend before their contracts begin.

____Every teacher should be able to identify and diagnose the mathematics learning problems for which Teaching Strategy X would be appropriate.

____Linda Parsons, one of the primary teachers, says she is very interested in learning about Teaching Strategy X from Dr. C. and thinks the other teachers would be interested too.

Now, look at how you have classified these statements. Do you have information of all four kinds? If so, what action would you take from here? If you don't have information of all four kinds, what information would you seek?

Most important question: Is a decision required in this situation?

____Yes

____No

____Can't tell--maybe

D

B

A

B

A

B

B

B

D

B

A

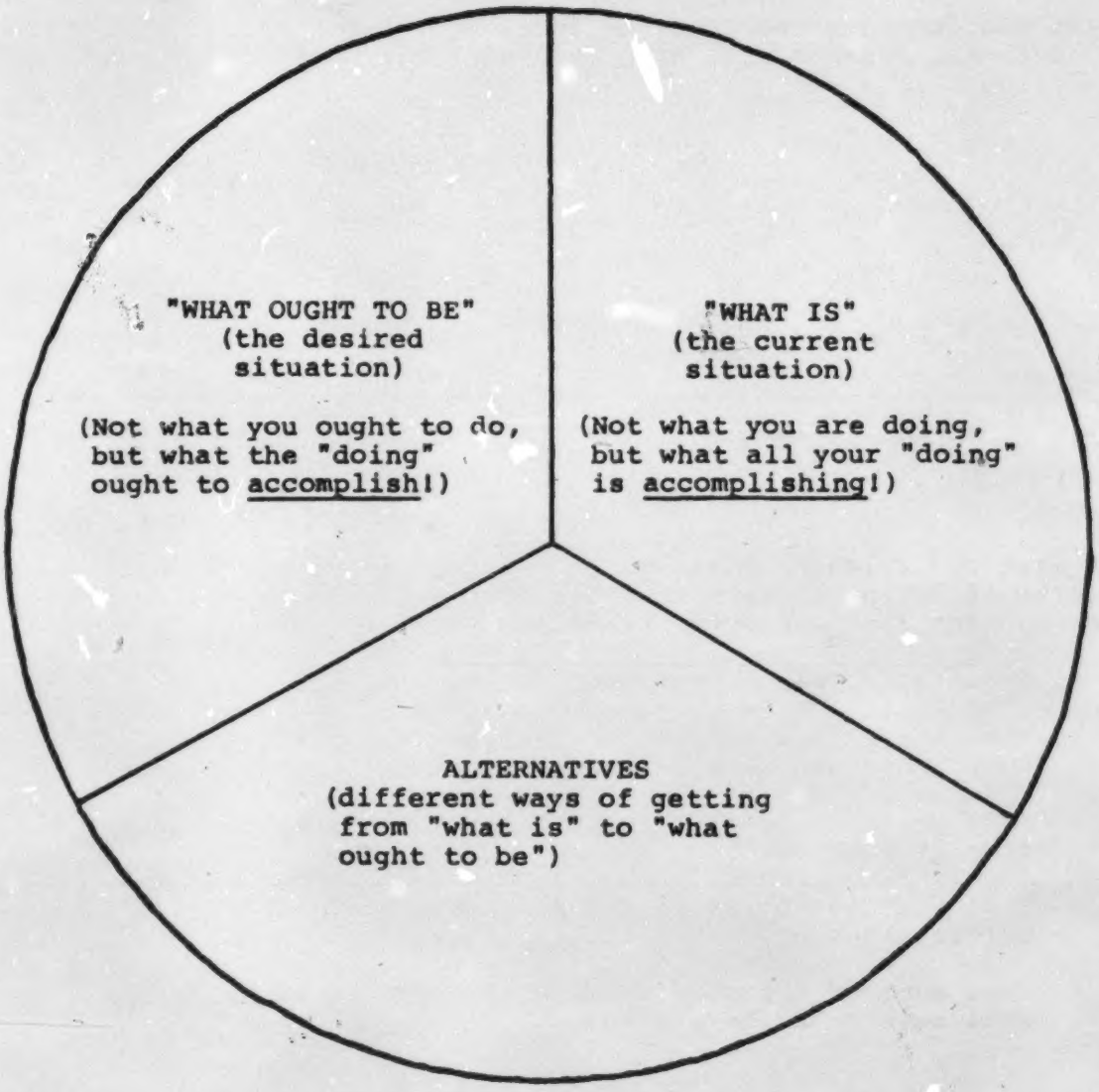
D

A

Question: Is a decision required in this situation?

Answer: Can't tell--maybe

COMPONENTS OF A DECISION SITUATION


"WHAT OUGHT TO BE"
(the desired situation)
(Not what you ought to do, but what the "doing" ought to accomplish!)
"WHAT IS"
(the current situation)
(Not what you are doing, but what all your "doing" is accomplishing!)
ALTERNATIVES
(different ways of getting from "what is" to "what ought to be")

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E.S.E.A. Title III
Tucson Public Schools

Session 2 Posttest

Name: _____
Date: _____

1. Name and describe the three categories of information an educational manager must have before he can make an informed decision.

2. Of what condition(s) must you be <u>certain</u> <u>before</u> you select a course of action to take in a decision situation? (There may be more than one appropriate answer.)

   a. That there really is a problem to be solved.

   b. That there is a discrepancy between what is being accomplished and what should be accomplished.

   c. That you have identified at least two distinct alternative strategies.

   d. That you have utilized all available sources of relevant information.

   e. That each of the courses of action you are considering will eliminate the problem.

3. In the left column, check those decision-making behaviors you think are characteristic of you <u>now</u> (check as many as apply).

   In the right column, check the three (3) behaviors you would <u>most</u> like to be characteristic of you <u>by the end of this year</u>.

Characteristic Now	Decision-Making Behavior	By End of Year (Check 3)
	I consistently distinguish current achievements from desired achievements when analyzing problem situations. I avoid assuming that what I hope to be the case is what actually is.	
	I seek competing alternatives to my favorite problem solutions. I ask others who are likely to have different viewpoints to suggest alternatives.	
	When others come to me for assistance in making decisions, I am more likely to ask questions to clarify the problem than to offer suggestions for solving the problem.	
	When analyzing problematic situations, I seek concrete measurements of current results or achievements, quantifying such measures whenever possible.	
	When seeking possible solutions to a problem, I make sure the alternative approaches I consider are distinct and that each possible solution is a possible solution to the entire problem, not just a part of it.	
	I am as accurate and as precise as possible when I request information from others that I need in order to make a decision. I make sure I know exactly what I want before making such requests.	
	When I attempt to identify and analyze problems, I am careful to distinguish activities from the results of those activities. I focus first on outcomes and then on ways of achieving these outcomes.	
	I consciously identify the criteria I will use in selecting a solution before I make a selection, not afterward. I use such criteria to help me select the best solution, not to justify an intuitive choice I've already made.	
	When others ask me to help them analyze problems, I am able to recognize from their questions what kind of information they need. When someone asks me "what is," I don't make the mistake of telling him what I think "ought to be."	

Scoring Key
Session 2 Posttest

1. What Is -- level of present accomplishment, present results, outcomes, etc. (not present activities)

   What Ought To Be -- level of desired achievement, goals, objectives, etc. (not desired activity)

   Alternatives -- Possible ways of getting from "what is" to "what ought to be." methods of achieving goals, possible solution strategies etc.

2. All responses except e.

3. Identify all statements checked in right-hand column which are not checked in the left-hand column, and interpret these responses as follows:

   a. If Statement 2, 5 or 8 is checked, the response is indicative of a desire to be more objective in the future in evaluating alternative solutions to problems.

   b. If Statement 3, 6 or 9 is checked, the response indicates a desire to be better able to communicate with others when seeking or providing information for making decisions.

   c. If Statement 1, 4 or 7 is checked, the response indicates a desire to be more accurate and precise in his efforts to identify, define and analyze problems.

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Tucson Public Schools

Management Study Group

Session 3

The Decision-Making Process

Objectives

After participating in this session's activities, the participants will:

1. Recognize at least one opportunity to apply the decision-making process in their own areas of responsibility during the current year. (4)
2. Demonstrate the belief that using the systematic decision-making process will result in the visible and verifiable improvement of educational outcomes and processes. (5)
3. Demonstrate the belief that focusing on outcomes instead of means during problem identification and analysis will enable them to be more objective in evaluating alternative solutions to those problems. (8)
4. Demonstrate a belief that in the future they will be more conscious of the relationship of means to ends in making decisions. (11)
5. Comprehend the process of systematic decision making. (18)
6. Consider it an advantage to use the systematic decision making process in that it will save time in the long run (1)

The degree to which the participants actually achieve these objectives will be determined in the same way as described in Session 1.

Activities for Part 3 of This Session

3-1. The Five Stages of the Systematic Decision-Making Process (30 minutes)

Distribute Handout 3-1, The Five Stages of the Systematic Decision-Making Process, to the team members. Explain each step briefly and how it contributes to the development of the components of a decision.

Ask the group these questions:

1. How would you describe the decision-making process as it actually occurs in the course of your work? How is it similar to this one? How does it differ?
2. How deliberately do individual decision makers go about making decisions? How about group decision-making situations? Does the process differ from that usually used by an individual?

3. To what kinds of problems do you think this decision-making process would apply? Name some examples in each of the four functional areas of management.
4. Which of the five stages of the process are heavily dependent upon the quality of information available to the decision-maker(s)?

3-2. The Flowchart of the Systematic Decision-Making Process (60 minutes)

Distribute Handout 3-2, Flowchart of the Systematic Decision-Making Process, to the group. Show the group that the flowchart is an expansion of the five-step process they have just discussed. Give each team member a few minutes to examine the flowchart individually.

Ask the team to suggest a number of decision-making situations to which they think the flowchart could be applied. Select one of these situations to use as an example for demonstrating the way a manager would use the chart to arrive at an informed decision. Ask the team to identify the tasks the manager would take at each point in the flowchart in order to solve the particular problem under discussion. Guide the group's discussion in order to avoid the tendency to digress prematurely to the discussion and evaluation of possible solutions to the problem.

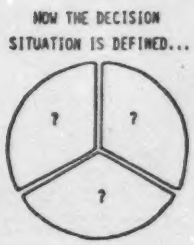
When the demonstration is completed, ask the group these questions:

1. Does the process seem too deliberate? Is it worth the effort in some cases?
2. What seems to have been left out of the process?
3. Would the process be likely to become less time-consuming and less cumbersome if it were used frequently?

THE FIVE STAGES OF THE RATIONAL DECISION-MAKING PROCESS

I. UNCERTAINTY (AWARENESS)

THE AWARENESS OF THE EXISTENCE OF A PROBLEM--A SENSE OF DISSATISFACTION WITH THE CURRENT LEVEL OF ACCOMPLISHMENT.



AT THE END OF STAGE I

II. ANALYSIS AND DEFINITION

THE CLOSE ANALYSIS OF CURRENT AND DESIRED LEVELS OF ACCOMPLISHMENT; IDENTIFICATION OF CAUSES OF PROBLEM AND REQUIREMENTS FOR SOLUTION.

AT THE END OF STAGE II

III. CREATION OF ALTERNATIVES

THE LOCATION AND/OR GENERATION OF AT LEAST TWO DIFFERENT STRATEGIES WHICH WILL BRING CURRENT LEVEL OF ACCOMPLISHMENT TO DESIRED LEVEL.

AT THE END OF STAGE III

IV. VERIFICATION AND SELECTION

THE IDENTIFICATION OF CONSTRAINTS AFFECTING CHOICE OF AN ALTERNATIVE: THE APPLICATION OF SPECIFIC CRITERIA TO EACH ALTERNATIVE--SELECTION OF ALTERNATIVE.

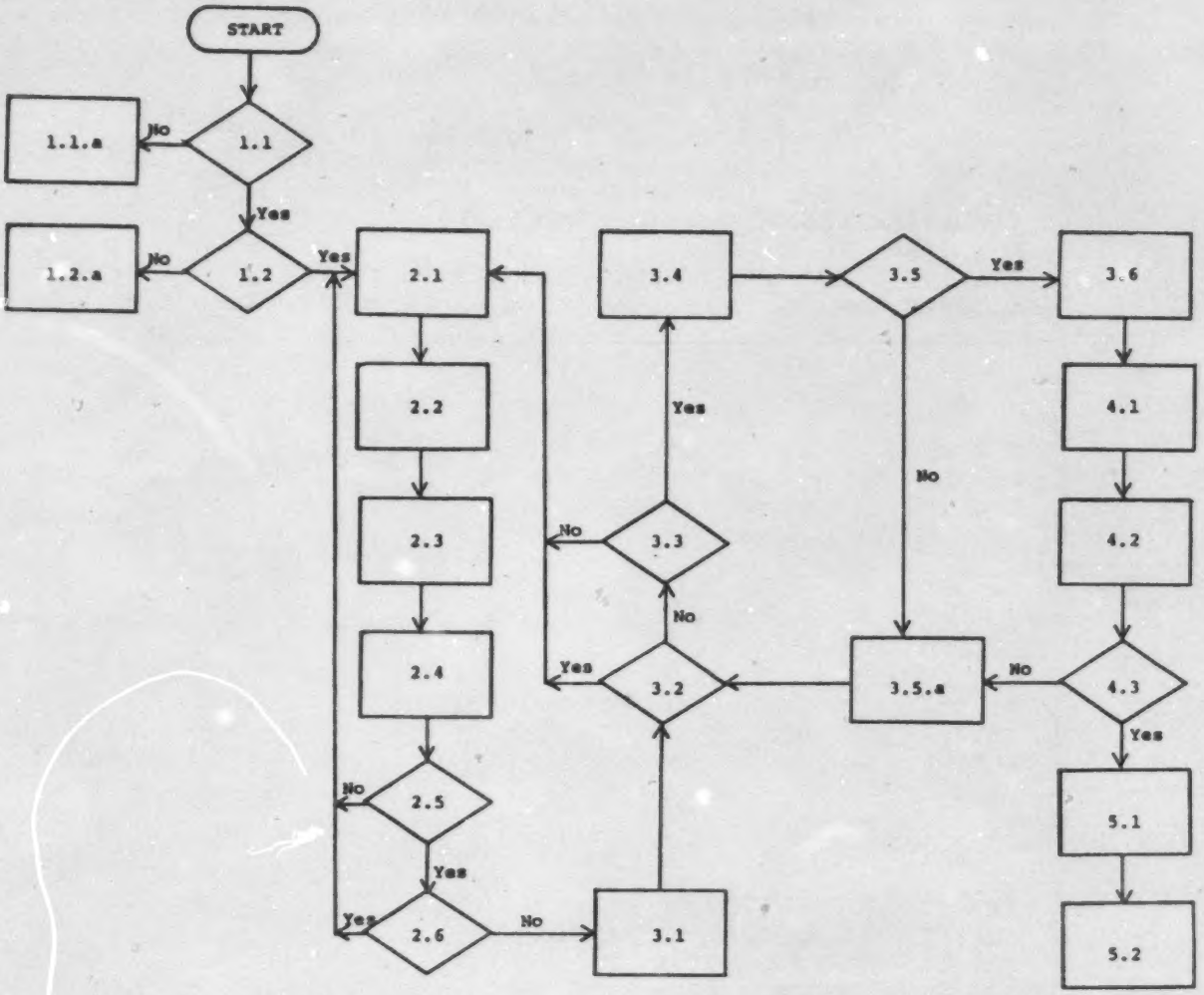
AT THE END OF STAGE IV

V. IMPLEMENTATION

PREPARATION FOR PUTTING THE SELECTED ALTERNATIVE STRATEGY INTO OPERATION; IMPLEMENTING THE STRATEGY; DIRECTING AND CONTROLLING ITS IMPLEMENTATION.

FLOWCHART FOR SYSTEMATIC DECISION MAKING

Handout 3-2



1.1 Contradictory facts confuse you? Unpleasant situations frustrate you?
1.1.a. No problem or at least you aren't aware of it.
1.2 Is the situation problematic? Is it worth the time, cost and effort required to solve it?
1.2.a. Abandon this decision making effort now.

2.1 Reduce situation to relevant observed facts.
2.2 Describe observed facts in verbal or symbolic form.
2.3 Distinguish relevant facts from irrelevant, etc.
2.4 State problem as a question.
2.5 Can problem be stated in one question which includes one or more goals describing desired outcomes?
2.6 Problem analysis affected by bias, emotion, tendency to rationalize, etc.?

3.1 Identify at least two alternative solutions
3.2 Alternatives vaguely defined, broadly conceived?
3.3 Can you estimate and develop consequences of each alternative?
3.4 Estimate consequences of each alternative.
3.5 Do any of the alternatives look like appropriate solutions?
3.5.a. Devise more alternatives or revise goals.
3.6 Reexamine, confirm, substantiate, verify, test each alternative.

4.1 Select best alternative.
4.2 Reexamine, confirm, verify selection.
4.3 Does it still look like the best solution?

5.1 Anticipate implementer response.
5.2 Maximize positive, minimize negative consequences in executing the decision.

EDUCATIONAL MANAGEMENT PROJECT
E.S.E.A. Title III
Tucson Public Schools

Management Study Group
Session 3 Posttest

Name: _____
Date: _____

1. Name and describe (in their proper sequence) the five main stages of the systematic decision-making process.

2. Can you think of any situation(s) within your own area of responsibility to which the systematic decision-making process might apply? _____ (If no, skip next question.)

3. Briefly describe the situation(s) to which you think this decision-making process could apply (just a phrase or two for each situation):

4. For each of the following statements, indicate whether you agree (A), disagree (D), or believe there would be no difference (ND).

___a. Visible and verifiable improvement in educational outcomes is more likely to result when a manager uses the systematic decision-making process than when he uses a more intuitive, less deliberate approach.

____b. In the long run, using the systematic decision-making process will help the manager make better use of his time than will using a more intuitive, less deliberate approach.

____c. During the problem analysis stage of the decision-making process, focusing on outcomes instead of on possible solutions will help the decision maker be more objective in evaluating possible solutions later.

____d. Having studied the systematic decision-making process will make me more conscious of the relationship of means to ends in making future decisions.

Scoring Key
Session 3 Posttest

1. Awareness of the Problem
   Analysis and Definition
   Creation of Alternatives
   Verification and Selection
   Implementation
   (Titles of steps need not be exactly the same, but may be reasonable substitutes reflecting similar meaning. Each step should be defined or described in terms similar to the definitions given in Handout 3-1.)

2. Affirmative response indicates the person taking the test has reflected upon how he could use the decision-making process in his own setting.

3. Again, look for an indication that the applicability of the process has been considered.

4. Agreement with these statements indicates that the person taking the test has evaluated favorably the applicability of the decision-making process.